

TRUST MATTERS

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Electronic Notifications Prove Popular

Over a ten-week period this summer, Individual Indian Money beneficiaries who use direct deposit or a debit card were offered options to receive deposit notifications electronically, instead of by regular mail. The two new options were text message or email e-notifications.

Thirty-four percent of the recipients who received the offer responded. Of those who responded, about eight in nine chose either one of the e-notification options or chose to eliminate notifications and just get the information on their quarterly Statements of Performance. Those who chose to continue to receive print deposit notifications by regular mail typically made the choice due to a lack of cell phone service or Internet access.

A deposit notification is sent each time the Office of the Special Trustee for American Indians (OST) sends funds to a beneficiary's individual financial account. An e-notification is sent the morning after OST sends the funds to an account. The e-notification is typically received by the beneficiary either the same day or the day after funds are credited to the individual's financial account. A paper notification may arrive several days after the deposit is made.

OST considers this project a great success! Besides providing safety and convenience for beneficiaries, OST anticipates significant savings in printing and postage costs over the coming years.

More information about e-notifications is available by calling the Trust Beneficiary Call Center (TBCC) at 1-888-678-6836. The call is toll free. TBCC is open Monday through Friday from 7 a.m. to 6 p.m. and Saturday from 8 a.m. to noon, Mountain time.



Tax Rulings on Settlement Payouts

Over the past year, many tribes have settled trust mismanagement lawsuits with the Department of the Interior. Tribal members who receive payouts from settlement funds have a need to know income tax implications of these payments.

The Internal Revenue Service (IRS) has made a ruling about trust payouts. IRS Notice 2012-60, *Per Capita Payments from Proceeds of Settlements of Indian Tribal Trust Cases*, advises, in part, that "per capita payments made from the proceeds of an agreement between the United States and an Indian tribe settling the tribe's claims...are excluded from the gross income of the members of the tribe receiving the per capita payments." The notice is available online at www.irs.gov/pub/irs-drop/n-12-60.pdf. You may also link to the notice from the homepage of the OST website: www.doi.gov/ost.

To learn more, the IRS contact for this notice is Sheldon Iskow, Office of Associate Chief Counsel (Income Tax & Accounting). You may call 202-622-4920 or email sheldon.a.iskow@irs.counsel.treas.gov.

OST Supports DOI's Information Technology (IT) Transformation

The IT Transformation initiative of the Department of the Interior (DOI) is changing the way DOI does business in order to deliver IT services in a more cost-effective, customer-friendly manner, and establish a 21st century model that will better support its missions. All DOI bureaus and offices are active participants in IT Transformation. Throughout fiscal year 2013, the initiative will be focused on three areas of change: migration to a new enterprise email and collaboration system, data center consolidation, and network optimization.

Standardization of the email system across DOI will provide greater opportunities to connect and collaborate with groups department wide. The transition to an enterprise email system, managed by the DOI Office of the Chief Information Officer, will allow IT personnel in the Office of the Special Trustee for American Indians (OST) to refocus their workload hours. Personnel time previously expended on managing the email system will be applied to other OST mission critical IT projects.

Reducing the number of data centers across the government is a federal goal. OST has one data center, which will close in fiscal year 2013. OST's data will be consolidated into the Bureau of Indian Affairs' primary data center in Albuquerque.

The goal of network optimization is to improve performance while lowering costs. To do this, DOI will consolidate bureau/office network firewalls and security devices, consolidate network circuits, and streamline the network. For example, the legacy of DOI's hastily constructed network architecture in response to the court-ordered restriction on Internet connectivity will finally be eliminated as network optimization progresses. This means faster network performance, which, in turn, will result in agency-wide productivity improvements.

The focus in fiscal year 2014 will be on an enterprise-wide service desk and workplace computing. As efforts progress, users will benefit from more effective technology solutions, resulting in improved services to customers and the public.

For information about IT Transformation, follow the tweets at https://twitter.com/doi_it_leaders. The initiative's strategic plan is posted online at www.doi.gov/ocio/it-transformation.cfm. To learn more, contact OST's Associate Director of Information Resources, Caren Williams, at 202-208-3158.

New Certified Federal Surveyor Certification Panel Members Appointed

Chief Cadastral Surveyor for the Bureau of Land Management, Don Buhler, recently announced the appointment of four new members to the Certified Federal Surveyor (CFedS) Certification Panel:

- **Glenda Miller**, an Alaska Native, is the Fiduciary Trust Officer for the Alaska Region and the new representative from the Office of the Special Trustee for American Indians;
- **Jan Michael 'Looking Wolf' Reibach**, a Kalapuya Native, is the Tribal Lands Manager for the Confederated Tribes of the Grand Ronde and the new tribal representative;
- **Anthony J. O'Rourke**, a Yurok Native, is a surveyor with Trinity Valley Consulting Engineers Inc. and a new at large member; and
- **Boyd Peterson**, the Bureau of Land Management Indian Lands Surveyor (BILS) for the Bureau of Indian Affairs Eastern Region, is the new BILS representative.

The panel provides oversight for the CFedS program, which was developed to ensure that land boundary surveys for federally recognized tribes and individual Indians or Alaska Natives are executed in accordance with accepted professional standards, and are in compliance with current policies and legal interpretations of the Department of the Interior and the Bureau of Land Management. The program consists of seven courses, a six-hour examination, and required continuing education courses.

The program is offered to registered professional land surveyors to elevate their knowledge and skills for providing cadastral services on trust lands. There are currently over 550 CFedS registered in 44 states.

For more information about the program or to find a CFedS in your area, go to www.cfedS.org.



What's Ahead for the Commission on Indian Trust Administration and Reform

The Secretary of the Interior established the Commission on Indian Trust Administration and Reform with Secretarial Order 3292, signed December 8, 2009. While the initial order will be effective with final approval of the Cobell Settlement, Secretary Salazar decided possible reforms and recommendations from the Commission could not wait, so the Commission was chartered in November 2010.

As Secretary Ken Salazar noted at the first meeting of the Commission in March 2012, this is an historic opportunity to continue to improve the trust relationship and do what is best for Indian Country. Since that March meeting, the Commission has been working to define and provide clarity about the Department's trust responsibility. In September, Deputy Secretary David Hayes sent a letter asking the Commission to focus on the management and administration of trust assets across the Department, with particular attention on management and oversight, improving services, and coordination and management of fiduciary assets.

The commissioners expect to discuss preliminary recommendations at their next meeting in Seattle, Washington, December 6-7, 2012. These recommendations take into account feedback received from three in-person meetings of the Commission; two webinars; a public session at Fort Berthold; two meetings with youth; and responses by tribal leaders and organizations, individual Indians and Interior employees to five questions posed by the Commission requesting recommendations for how to improve the administration and management of trust assets.

The Commission continues to seek feedback from interested parties across the nation. It is only by hearing from individuals, whomever and whatever viewpoints they represent about the trust, that the Commission can make well informed recommendations.

To communicate with the Commission, email trustcommission@ios.doi.gov. For the latest information, visit the website www.doi.gov/cobell/commission/index.



Images of the Commission meeting held June 11-12, 2012, in Albuquerque, New Mexico.

Financial Skills Training Offered in Largest School District

Ready!

Room's ready for training



Set!

Training materials are set



Go!

Participants go for it



Fiduciary Trust Officer (FTO) Elizabeth Sparks has been a prevalent force behind the Building Native Communities Financial Education Program that is being offered to students in the Gallup McKinley County School District, which at approximately 5000 square miles is the largest school district in the United States. FTO Sparks has supported this training program by meeting with district leaders, speaking in classrooms and organizing school wide events.

According to correspondence from a school official, due to FTO Spark's vision, this is the most widely used financial education program in Gallup schools. The school official noted, with thanks to FTO Sparks, that students and their families have been influenced by the training.

The curriculum was offered first at Gallup Central High. Now all nine high schools in the Gallup McKinley School District, which is located in New Mexico on the Navajo Reservation, are using it, as well as one private Catholic school in the area. Teachers are able to adapt the curriculum for their classes.

The training, created by First Nations Development Institute, is suitable for individuals at all levels of experience with cultural and traditional components designed specifically for Indian country. Whether it is taken by students in high school, employees of tribes, other adults or elders, participants are encouraged to implement their training to increase chances of future financial success.

The Office of the Special Trustee for American Indians (OST) has been partnering with First Nations Development Institute since 2008. In May 2009, 12 FTOs participated in a week-long train the trainer session at the National Indian Programs Training Center. The session prepared them to provide financial skills training to trust beneficiaries throughout Indian country.

To learn where OST is currently offering financial skills training, contact your local FTO. A list of FTOs is available online at www.doi.gov/ost/fto. You may also call the Trust Beneficiary Call Center (TBCC) to obtain contact information for your FTO. Call, toll free, 1-888-678-6836. TBCC operates six days a week, Monday through Friday from 7 a.m. to 6 p.m. and Saturday from 8 a.m. to noon, Mountain time.

**Are your financial skills
working for you?**



*Did you know? The Trust Beneficiary
Call Center answers, on average,
720 calls per day.*